

Plan IT! Key Issues SAMPLE Report 1

This document is a record of the process between the Plan IT! consultant and the Technology Leadership Team (TLT) to identify key technology issues that will be the focus of the Plan IT! planning phase.

SECTION 1

Organization: **Nonprofit Organization**

Technology Leadership Team:

1. Name, Title
2. Name, Title

Consultant(s):

- 1.
- 2.

SECTION 2: Technology Assessment issue identification

A. Issues identified as key through the assessment process by TLT:

1. **Rudimentary use of Social Media to connect with community:** Facebook is used in a limited way, but updates are not posted in any consistent way, and there are only a few followers. Events are not advertised on Facebook.
2. **No single "voice" for Social Media:** When email is sent, or posts are made to Facebook, multiple people write those emails/posts, so there are multiple writing styles. There are no guidelines for expressing information that is sent out to the community.
3. **Scheduling for volunteer activity is time-consuming:** Several spreadsheets are used to manage volunteer activity. Volunteer schedules are coordinated via email and phone.
4. **Office network and wireless provides poor connectivity:** A (wired) office network connects a few machines in the office, but not all machines. Wifi is available in the office, but it is not always stable, and it may not be properly secured.
5. **No remote access for staff who want to work off-site:** It is not possible for staff working remotely to connect to the office network (e.g., logging in from home, accessing documents and data, etc.).
6. **Concerns about adequate protection of sensitive client data:** It is not clear whether client data (e.g., contact information) is being kept private. Information is primarily kept on paper at this point, but it is possible that some information may occasionally appear in emails or electronic documents. Most documents are stored on hard drives in office computers. Some documents may be moved to cloud-based storage in the future.
7. **No consistent backup process for data and files:** Files stored on hard drives are occasionally backed-up, but not on a regular basis. An online database stores donor information. There is no local copy of the data; it is assumed that the online database is

backed-up automatically. An Access database is also used, and is occasionally backed-up.

8. **No disaster-recovery plan:** There is no specific plan for handling a disaster situation where the office is not usable for some period of time (for example an earthquake, flood, major weather problem), and staff have to run remotely.
9. **Website is difficult to update:** Updates to the organization's website are rarely made, as it is difficult to update the website. The website is out of date, and does not help bring people, whether they are clients, volunteers, or donors, to the organization's programs and events.
10. **Old servers and server software:** The organization has 2 older servers, running Windows Server 2003 R2 and Microsoft SQL Server 2005. One is used as a file server, the other runs the database software and ticket-sales software (which uses SQL Server). As the servers are old, there is a risk that one or both may fail or need expensive repairs. The operating system software may also be reaching end-of-life and may not be supported in the future. It also may not support newer versions of application software.

ADDITIONAL NOTES for Consultants:

It may be that the organization wants to address multiple issues from the Assessment discussion within a single Key Issue. This is where the consultant can play a role helping the organization look at options, understanding the scope of issues, and looking at what else should be considered (such as funding, internal processes, training, etc.).

Organizations should always be careful, however, about taking on too much work, too much cost, or too much change at any one time, as it can overly tax the organization's staff. At the same time, being efficient in making change can potentially be beneficial, if there can be a single period of change and then the organization moves on with improved capabilities.

Creating a Change Management plan can be helpful in identifying and reducing risk during periods of change.

SECTION 3: Three Key Issues

Based on dialogue between organization and the consultants, up to three of the issues above are selected as the focus for the Plan IT! Plan.

Issue 1. Rudimentary use of Social Media, with no editorial guidelines

Issue description: There is only rudimentary use of Social Media to connect with current and potential donors, volunteers, supporters, etc. There is a Facebook account, but new messages are rarely posted. Events are not posted to Facebook. There are no accounts on Instagram, or on Twitter.

In addition, there are no clear guidelines for the organizational "message", and for "tone" of messages, that are posted. The community does not see a consistent view of the organization and its work.

Description of intended outcome: The organization has active accounts on major Social Media platforms (Facebook, Instagram, Twitter, etc.), and has a clear communications plan for the types of content that should be posted to each platform, how often new content is posted, and how content is written in order to present a common message and voice from the organization. The goal is to improve communications with supporters and the community in general.

Possible measure(s) of success: There are more followers on the various Social Media platforms, who comment on posts (though comments may need to be moderated if they are not constructive). There are more attendees at events that have been advertised, and possibly more donors. Will need confirmation that people are actually seeing the posts, possibly with a survey in the future.

Challenges: It is not clear whether a single person, or a group, will take care of posts to Social Media, and how much time it will take.

Resources needed: Other organizations may have published editorial guidelines for Social Media, which might provide good examples to examine.

Comments:

- This issues addresses both concerns about rudimentary use and the lack of a consistent 'voice' in the organization's use of social media.
- This issue focuses on platforms like Facebook, and intentionally excludes email or the website, at least for now.
- In the future, it will probably be a good idea to broaden the communications plan to include email and the website.

Issue 2. Server hardware and server software is old, with no process to backup files or data

Issue description: There are 2 older servers, running Windows Server 2003 R2 and Microsoft SQL Server 2005. The machines are old, and the server software is outdated. One machine is used as a file server, the other runs the database software, and ticket-sales software. The age of the machines, and the server software, is a concern. In addition, files and data on these machines are not consistently backed up, putting a lot of work at risk.

Description of intended outcome: There is a clear plan for supporting needs related to storage and access of files, running database(s), and ticket sales. This may require either purchasing new servers, or moving to cloud-based solutions.

- There will be a plan for raising funds to support any purchase.
- Any new procedures needed for working with files, or for ticket sales, will be written.
- There will be a training plan as needed for new servers and/or new software.

- There will be a plan for backing up files and data, whether stored on a new server, based online in the cloud, or stored in another way. This should include a plan for making local backups of the online donor database.

Possible measure(s) of success: Files are stored and accessible in an updated server or in the cloud.

- Ticket sales are supported with either updated software or a new solution. Any databases are also supported on the updated server, or in a new solution.
- Staff and volunteers know the process for storing and accessing files, and rates of file storage are tracked.
- People are successfully buying tickets with the ticket-sales software. The volume of ticket sales is measured, as well as buyer satisfaction (with ticket-buyer surveys).
- There are regular file and data backups. Periodic tests are made to confirm that the backup and restore processes work as expected. Donor data is also backed up locally.

Challenges: This is not just about updating old servers and software.

- The server supports real work, in terms of file and data storage, and ticket sales, which needs to continue.
- The aspect of changing ticket-sales software is quite significant, and is likely a major project all on its own. Options for ticket-sales will have to be carefully evaluated, before committing to any server changes.
- Funding will need to be in place before any purchases.
- Staff and volunteers will need to be fully trained in any new hardware or software (including any cloud-based solution).

Resources needed: Other nonprofits may have made similar hardware/software upgrades, and may have reports on any problems or issues that were encountered. There may also be reports of best-practices which should be investigated.

- Consultants may be needed to help create and execute plans.

Comments:

- Note that this issues addresses both a lack of consistent backup processes for data and files as well as the server hardware concerns.
- Note that this is actually a big project, impacting how files, data, and ticket sales are managed. There will likely be a gradual migration to new capabilities, to ensure that any risks are minimized to operations, staff support, and client support.

Issue 3. Poor network and wireless connectivity, and limited remote access from outside.

Issue description: There is an office network (wired), but not all machines are connected to it. Wi-fi (wireless network) is available in the office, but it is not entirely stable throughout the

office, and it may not be properly secured. People working outside the office are not able to log into the office network. Machines connected to the network are able to access the Internet.

Description of intended outcome: All machines (including printers) in the office are on the wired network. Secure wifi is available for all laptops, and works throughout the office. Staff are able to login to the network and work remotely. All machines on the network also have Internet connectivity. There is a written process for securely accessing the network, either within the office or remotely, and staff have been trained.

Possible measure(s) of success: Reports of network connection problems in the office are minimal (only a few per month). Staff connectivity, when working remotely, is monitored. Staff indicate they are more productive and have less downtime related to connectivity problems. Wifi and remote access is password-secured. Anti-virus software and Internet firewall are in place.

Challenges: Make sure there is a fundraising plan for any new networking hardware. Make sure the best approach for securing the wireless network is understood, as well as remote access to the network. Make sure staff know the process for securely accessing the network, and know how to report any network problems.

Resources needed: Look for best practices with regard to securely offering wi-fi on a network, and for remote access.

Comments:

- Note that this issue addresses both the poor connectivity of the office network and wireless as well as remote access concerns.
- Network changes will likely be implemented gradually, to make sure each phase works properly before moving on to the next task.

SECTION 4: Key Issue Scope for Plan IT!

The issues identified as key above directly influence the organizational mission of ORGANIZATION. ORGANIZATION will make progress in achieving the following goals by focusing on the key issues above.

Goal 1: Social Media accounts are actively used to communicate with donors, volunteers, and supporters, to promote the organization and its events. There are clear editorial guidelines, with examples, for creating posts to Social Media accounts.

Goal 2: There is a plan for improving storage of files and data, as well as updating support of ticket sales. This may involve update/replacement of the old servers, including update of the server software, in order to support needs related to file storage, database, and ticket sales. This will include a funding plan for any purchases, plan to write-up any new processes and train staff, and a plan to implement backups of data and files.

Goal 3: There is a plan for getting all machines in the office on the wired network, for offering secure wifi for any laptops, for securely offering remote access for offsite-workers, ultimately resulting in network improvements. There is a funding plan for any networking purchases required. There will be written procedures for wifi and remote access, and a plan for training staff.

SECTION 5: Scope agreement

501 Commons consultants have helped to guide the creation of this key issues report but the Technology Leadership Team is responsible for the decisions included here.

Agreed to by Technology Leadership Team members:

- 1.
- 2.

Agreed to by the Executive Director

- 1.